

5/10/22

Bulletin No. 22-16

P-2113F

P-2113F Standard Case File System (Continued)

F. Interview Case Action Notes (CATN)

It is very important to document interviews with applicants and household members. Be complete, clear and concise in the notes. An Interview CATN should include:

- Whether or not the interview was completed and whether it was face-to-face or on the phone (example: “phone interview completed” or “face-to-face interview completed”).
- Discrepancies between what was provided on the Application and what was clarified in the interview. CATN the differences by STAT panels.

Example: MEMB – JOHN DOE IS JUST A FRIEND
EATS – THEY REPORT P&P'ING SEPARATELY

- If verification was requested: what kind of notice was sent, what was requested, and when it is due.

BPS Support (links are only available internally)

Interview Checklist

- Review CATN notes six months prior to date of application and recent documents in OnBase. Even on the Interview Line (ININ), take a moment to check before starting the interview.
- Complete the interview (refer to [Interview Scripts](#)) and ask all questions and explore as appropriate.
- CATN should include:
 - Whether or not interview was completed.
 - Whether interview was face-to-face or on the phone.
 - PVS run on: Customers name
 - EDRS run on: Customer name
 - If verification was requested: what kind of notice was sent, what was requested, and when it is due.
 - Discrepancies between 202/R and ACCESS in your interview. CATN - enter the differences by STAT panel. Examples:
 - MEMB - JOHN DOE IS JUST A FRIEND
 - EATS - THEY REPORT P&P'ING SEPARATELY

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F. Interview Case Action Notes (CATN) (Continued)

- Update STAT Panels - make sure to update as much as you can and process what benefits you can.
- Collateral Calls - document in CATN your attempts to get the needed information by phone and follow the [verification matrix](#).
- If verification is not obtainable by phone, send out the verification request (202V, 202RL2, or 202VCR).
- Offer ICAN services – document in CATN—ICAN Services were offered to (Customer Name). Explained ICAN activities, information about rights and responsibilities, and participant reimbursements: customer “declined” or customer wanted more information. 218FS sent to customer.
 - If the customer is aged or disabled CATN should say the customer not interested in working, ICAN service not offered.
- Double check the STAT panels and ELIG screens before hitting APP. Ensure that there are no edits on the case.
- Check TODO/D/CASE - Get rid of any TODO's that you can.
- SPEC/C/XFER - All cases should be transferred to where the customer resides except Burlington District Office (BDO).
 - All pending and active Reach Up and Essential Person (EP) cases go to BDO;
 - Other programs have an alphabetical assignment if residing in BDO area:
 - A-G St Albans (ADO)
 - H-M Middlebury (YDO)
 - N-R Barre (MDO)
 - S-Z Morrisville (VDO)
- The Reach Up Supervisor’s ACCESS worker number needs to be entered in the MEMB panel of all adults in the RU Household, under the SSU field.
 - Refer to [the list of Reach Up Supervisors in SharePoint](#) for current worker numbers.
- Work complete all docs in OnBase.
- Update appropriate tracker or log as needed.